Department of Alcohol and Drug Programs

SACPA Reporting Information System
User Manual

ADP Supplement

Updated: March 7, 2003

Table of Contents

INTRODUCTION

The SACPA (Substance Abuse and Crime Prevention Act of 2000) Reporting Information System User Manual was developed to help County users enter, update and delete fiscal information, capacity projections and client projections using the SACPA Reporting Information System (SRIS) web application. Since ADP's primary role in this process is to review and approve County Plans prior to disbursing allocations, the Department requires different functionality from the system. This supplement describes functionality of the SRIS that is specific to ADP users and is intended to be used in conjunction with the User Manual.

This Supplement contains instructions on how to:

- Select a County Profile
- Update Lead Agency Information
- Enter Calculated Distribution Amounts
- View the County Plans, Expenditure Report, Other Services Client Counts, Other Services Waiting List, Financial Status Report Lists
- Update Statuses for County Plan, Expenditure Report, Other Services Client Counts, Other Services Waiting List, Financial Status Report Status
- Access Reports

Access Rights

After you login to the SACPA Reporting Information System, you will have the opportunity to select whether you would like to view data for a specific county, or whether you would like to view data for all counties. Your access to functionality within the system differs based on whether you select a County Profile or elect to leave the County Profile blank. You will make your selection from the County Profile page which is displayed after you successfully login.

Whether you select a county or leave the County Profile blank, you will have access to the following screens:
- CA Home Page
- ADP Home Page
- SACPA Home Page
- Change Password
- User Set Up
- Distribution Amounts
- County Profile
- Reporting

If a County Profile is selected, you will have additional access to summary **Lead Agency Information** and **County Submissions** for the selected county. Also, if a County Profile is selected, you will have access to the following information:
- County Information
- Submissions

Selecting a County Profile

To view county submissions and county contact information, you must select a County. To select a County Profile, follow the steps below:

1. Logon to the SACPA Reporting Information System. The County Profile page will be displayed.

2. If you leave the County field blank. Your access will be limited to the screens available on the navigation bar (see above). You will not be able to access county specific information. Also, you will only have access to the Status report and Totals reports.

3. If you want to view summary data for a specific county, select the county from the **County** drop down list on the County Profile page.

4. Click **Submit**. The County Profile Page is redisplayed with the selected county name.

    The County Information and County Submission (County Plans, Expenditures, Other Services Client Counts, Other Services Waiting List, and Financial Status Reports) links become accessible on the Navigation Bar, and you will have access to all report types.

County Information Page

If you have selected a County Profile, you will be able to update Lead Agency and County Contact Information for that county. Only ADP staff have update privileges on Lead Agency information. County users will only be able to view Lead Agency Information.

Updating Lead Agency Information

To update Lead Agency information, follow the steps below.

1. Click the **County Information** link on the Navigation Bar. The County Information Page is displayed.

2. Click **Update Lead Agency Information** button. The Update Lead Agency Information page is displayed.

3.   Update any of the following fields as necessary:

Lead Agency Information
- **Name**
- **Address Line 1**
- **Address Line 2**
- **City**
- **State**
- **Zip Code**

4.   Click **Submit.** The Lead Agency Information page is redisplayed with updated Lead Agency Information.

5.   If no other updates are required on the Lead Agency page, click a link on the Navigation Bar to move to another page. The requested page is displayed.

Updating and Deleting County Contact Information

To update County Contact information, follow the steps below.

1.   Click the **County Information** link on the Navigation Bar. The County Information Page is displayed.

2.   Click **Update Contact.** The Update County Contact Information page is displayed.

3.   Update any of the following fields as necessary:

County Contact Information
- **Name**
- **Job Title**
- **Phones**
- **Fax**
- **Pager**
- **Mobile Phone**
- **Email Address**
- **Lead Agency Roles**
- **Notes**

4.   Click **Submit.** The County Contact Information page is redisplayed with updated County Contact Information.

Adding a New User

To add a new user:

ADP will add and modify users as county and ADP representative change. Users can be added as either ADP or as county users. Only ADP users have the ability to add new users and modify existing users.

1.   Click the **User Set Up** link on the Navigation Bar. The system will bring the user to the User Set Up screen.

2.   Select the <u>System User</u> link

3.   Choose **Add User.** Do not choose a user from the **User Name** drop down box. The system will bring the user to the **System User Add/Update Screen**.

4.   Choose the appropriate Honorific from the **Name** drop down box. Choices are: Mr., Ms., Mrs., Dr. and blank.

5.   Enter **First Name** and **Last Name**

6.   Enter **Effective From** date. The Effective From Date is the date the user can begin utilizing the system. Date must be on or after 05/01/2001.

7.   Enter **Effective Through** date. The Effective Through Date is the last day the user will be granted access to the system. This is not a required field and can therefore be left blank.

8.   Enter **User ID.** The naming convention for the User ID is the First Initial and Last Name, for example: John Smith's User ID would be JSMITH.

9.   Choose the user **Access Type.** Choose the access rights for the user. If a county user, choose the specific county for which they should have access.

10.   **Choose the access rights by selecting whether the user should be** Inquiry Only **or not. The system will default the user to update rights if nothing is chosen.**

11.   **Choose** Submit. **This will add the user.**

Standard Features:

1.	**Reset**		This will clear the contents of the data entry box and allow you to re-enter the information
2.	**Cancel**		To return to the previous screen.

3.	**Submit**	This will add the new user and return you to the main System User screen. If an error exists in the data, the system will issue an error message.

To modify an existing user:

What to Do	**Results/Comments**

1. Click the **System User** link on the Navigation Bar. The system will bring the user to the System User screen.

2. Choose the user you wish to modify from the **User Name** drop down box. To choose a different user, either choose a different user from the drop down box or click the **Reset** button

3. Click the **Update User** button. The system will bring the user to the **System User Add/Update Screen.**

4. Enter your modifications. To terminate a user's access, enter an **Effective Through** date. If an Effective Through date of 06/30/2001 is entered, user access will be terminated as of 07/01/2001.

5. Click the **Submit** button. System User information will be updated

Updating a County Liaison

The County Liaison module allows the user to update the ADP user acting as liaison to each county. This county liaison will then appear in the ADP Help link for each county.

1. Click the **User Set Up** link on the Navigation Bar. The system will bring the user to the User Set Up screen.

2. Select the <u>County Liaison</u> link. A list of ADP users with 'Update Rights' will display

3. Choose **Update Liaison.** The system will bring the user to the **County Liaison Information Screen**.

4.   Enter the **Job Title**

5.   Enter **Phone Number**e

6.   Enter **Fax Number** date (optional)

7.   Enter **Pager Number** (optional)

8.   Enter the **Mobile Number** (optional)

9.   Enter **E-mail Address** (optional)

10.   Check the box next to the counties for which the ADP liaison is responsible**.** The user may choose one or more counties. Also, the same county may be assigned to multiple ADP users.

11.   Choose **Save**. This save your changes.

Calculated Distribution Amounts

Whether you have selected a County Profile or have left the County Profile blank, you will be able to enter calculated distribution amounts by county. This is the screen where county allocation amounts will be entered.

Entering Calculated Distribution Amounts

1. Click the **Distribution Amounts** link on the Navigation Bar. The Calculated Distribution Amounts page is displayed.

   To enter a distribution amount, select the appropriate Fiscal Year from the **Add/Update Distribution Amounts for Fiscal Year** scroll list.

2. Click **Submit**. The County Calculated Distribution Amounts page is displayed.

   Data for all counties is visible if you scroll down the screen.

3. Enter the distribution by County in the **Calculated ADP $ Distribution** field for each county

4.   Enter the allocation amount for SATTA funds in the **Additional SATTA (SB 223) $ Allocation** field for each county

5.   Click **Submit**. The Total ADP $ Allocation for County will be calculated. (The distribution amount entered will be added to any Excess Funds Carry Over $ entered by the county).

Updating Calculated Distribution Amounts

The procedures for updating calculated distribution amounts are the same as those for entering distribution amounts. Refer to Steps 1-5 above.

County Submission Lists

To view a county's submission you must have selected a County Profile. As an ADP user, you will have access to three types of county submissions:

County Plans
Expenditures, Client Counts and Wait List Report
Financial Status Reports

County Submission Rules

Each county submission type has different rules. The rules are described below.

The County Plan
The County Plans List displays summary information, including Plan Status for all versions of plans created by a specific county. County Plans can be viewed directly on screen as long as the status is FINAL or higher. ADP can update the plan status only if the plan is marked with COUNTY APPROVED status or higher.

The Expenditures, Client Counts and Wait List Report

The Expenditure Report List displays summary information, including report status for all reports created for a specific county. ADP users can view reports with a status of COUNTY SUBMITTED or ADP RECEIVED. ADP users cannot view expenditure Reports with a status of DRAFT. ADP can update the plan status only if the report is marked with COUNTY SUBMITTED status or higher.

The Financial Status Report

The Financial Status Report List displays summary information, including report status for all reports created for a specific county. ADP users can view reports with a status of FINAL, POST AUDIT, UNDER APPEAL, and NO APPEAL. ADP Users can update and delete reports with a status of POST AUDIT, UNDER APPEAL and NO APPEAL. ADP users cannot view reports with a status of DRAFT.

How to View a County Submission

What to Do	Results/Comments
1. Select your County Profile.	

| **What to Do** | **Results/Comments** |

2.   Click the <u>Submissions</u> link on the Navigation bar. A list of Fiscal Years is displayed

3.   Select the link of the appropriate fiscal year. The following screen will be displayed

Select the submission type you would like to view.   If you select County Plan or Expenditure, Client Counts and Wait List Report skip step 4.

What to Do	**Results/Comments**

4. If you select the Financial Status report you must select the link <u>Update or View an Existing Financial Status Report</u>.

5. The submission list will be displayed.

What to Do	**Results/Comments**

6. Select the link of the submission you would like to view/update. The Status field acts as a link to the report or plan.

    NOTE: ADP users cannot view submissions in DRAFT status.   If the plan or report is in DRAFT, you will not be able to view it and the Status field will not act as a link.

7. Once you select the submission to view/update, listing of forms will be displayed. From this page you will have the option to move between web forms and update the status of the submission. Click the link of the form you would like to view or select the Update Status link.

Update Status: For the County Plan, ADP users can update statuses with a status of County Approved or higher. (See the County Submission Status section for a complete list of statuses.)

For Expenditures, Client Counts and Wait List Reports, ADP users can update statuses with a status of County Submitted or higher. (See the County Submission Status section for a complete list of statuses.)

What to Do	**Results/Comments**

For the Financial Status Report, ADP users can update statuses with a status of FINAL or higher as long as both a Level 1 and Level 2 approver have approved the report. (See the County Submission Status section for a complete list of statuses.)

Updating County Submissions Report

ADP users can modify Financial Status Reports if the plan is in POST AUDIT or higher status. See the County Submission Status Rules section for a complete list of statuses
Other than Financial Status Reports, no other county submissions can be modified by ADP users.

To modify a Financial Status Report, the report must be changed to a status of POST AUDIT. NOTE: When the plan is changed from FINAL (with approval level 1 and 2) to POST AUDIT a copy will remain frozen with the status of FINAL to maintain a record of the original county submission. Once this is complete the POST AUDIT report will be available for ADP update.

To update the Financial Status Report:

What to Do	**Results/Comments**

1. Follow Steps 1-7 under 'How to View a County Submission'.

2. Select the <u>Financial Status Report</u> link.

What to Do

Results/Comments

To update the Financial Status Report, enter Accrual Amount information and click the Save button.

Lead Agency Information	County Employer ID Number
Health Care Services Agency/Behavioral Health Care Services 2000 Embarcadero Cove, Ste 400 Oakland, CA 94606-5300	946000501

Transactions	Accrual Amount
Total SATTF Funds Allocated	5,360,549
Approved Excess Funds Carried Over from Prior Fiscal Year	0
Total SATTF Funds Available During Funding Period	**5,360,549**
Expenditures for Drug Treatment Services	0
Expenditures for Additional/Ancillary Services (i.e. Family Counseling, Vocational Training, and Literacy Training)	0
Expenditures for Other Services (Court, Probation, Misc.) (i.e. Probation, Court Monitoring, and Miscellaneous Services)	0
Total Expenditures	**0**
Other Income (Interest, Sale of Equipment, etc.)	0
Client Fees Assessed by Trial Judges and Received by the County	0
Client Fees Assessed by Trial Judges and Collected by Treatment Programs	0
Client Fees Assessed and Collected by the County for County Operated Treatment Programs	0
Client Fees Assessed and Collected by Drug Treatment Programs for the Costs of Treatment. Note: These funds are not totaled in the Total Program Income	0
Funds Received from Providers for Audit Exceptions	0
Funds Received from County/Local Agencies	0
Total Program Income	**0**
Net Expenditures	**0**
Funds Available at End of Period	**5,360,549**
Comments/Remarks	

Certified By	Approved By Level 1 : Level 2 :

Save   Reset   Cancel

What to Do	**Results/Comments**

3.   Make all necessary updates and press the **Save** button.

Deleting County Submissions

ADP users can delete Financial Status Reports if the plan is in POST AUDIT or higher status.
See the County Submission Status Rules section for a complete list of statuses
Other than Financial Status Reports, no other county submissions can be deleted by ADP users.

To delete a Financial Status Report:

What to Do	**Results/Comments**

1.   Select your County Profile.

2.   Click the Submissions link on the Navigation bar. A list of Fiscal Years is displayed

What to Do	**Results/Comments**

3. Select the link of the appropriate fiscal year. The following screen will be displayed

4. Select the <u>Financial Status Report</u> link. The Select an Activity screen will be displayed.

What to Do	**Results/Comments**

5. Select the link <u>Delete an Existing Financial Status Report</u>. The Delete Report page will be displayed.

6. Select the **Delete** button next to the Financial Status Report you wish to delete. The report will be deleted. A message will be displayed requesting the user to confirm the deletion. The Financial Status Report selected will be deleted and the copy with the status of FINAL will be reactivated.

County Submission Status

Counties designate their plans and reports as ready for submission by changing the status to the appropriate code. ADP users then review their submission and change the status code to designate their receipt or approval.

County Submission Status Rules

County submission status rules vary depending on the type of submission. The following describes the status rules for each type of submission.

Submission Type	Statuses	ADP Status Access	County Status Access

County Plan	Draft	• None • Cannot Update • Cannot View • Cannot Delete	• Change to Final or County Approved • View/Update • Delete
	Final	• None • Cannot Update • View • Cannot Delete	• Change to Draft or County Approved • View/Update • Delete
	County Approved	• Change to ADP Approved or ADP Review/Pending Issues • Cannot Update • View • Cannot Delete	• Change to Draft of Final • View • Cannot Update • Delete
	ADP Approved	• Change to County Approved or ADP Review/Pending Issues • Cannot Update • View • Cannot Delete	• View • Cannot Update • Delete
	ADP Review/Pending Issues	• Change to ADP Approved or County Approved • Cannot Update • View • Cannot Delete	• View • Cannot Update • Delete
Expenditure Reports	Draft	• Cannot Update • Cannot View • Cannot Delete	• Change to County Submitted • View/Update • Delete
	County Submitted	• Change to ADP Received • View • Cannot Update • Cannot Delete	• Change to Draft • View • Cannot Update • Cannot Delete
	ADP Received	• Change to County Submitted • View • Cannot Update • Cannot delete	• View • Cannot Update • Cannot delete
Other Services Client Counts	Draft	• Cannot Update • Cannot View • Cannot Delete	• Change to County Submitted • View/Update • Delete
	County Submitted	• Change to ADP Received • View • Cannot Update • Cannot Delete	• Change to Draft • View • Cannot Update • Cannot Delete
	ADP Received	• Change to County Submitted • View • Cannot Update • Cannot delete	• View • Cannot Update • Cannot delete

Other Services Waiting List	Draft	• Cannot Update • Cannot View • Cannot Delete	• Change to County Submitted • View/Update • Delete
	County Submitted	• Change to ADP Received • View • Cannot Update • Cannot Delete	• Change to Draft • View • Cannot Update • Cannot Delete
	ADP Received	• Change to County Submitted • View • Cannot Update • Cannot delete	• View • Cannot Update • Cannot delete
Financial Status Reports	Draft	• Cannot Update • Cannot View • Cannot Delete	• Change to Final
	Final	• View • Cannot Update • Cannot Delete	• Change to Draft or add Approval 1 and 2 • View/Update • Delete
	Final with Level 1 and Level 2 Approvals	• Change to Post Audit • View • Cannot Update • Cannot Delete	• Change to Draft • View • Cannot Update • Cannot Delete
	Post Audit	• Change to No Appeal or Under Appeal (cannot change back to Final) • View/Update • Delete Note: when report is changed to Post Audit a copy of the report will remain frozen in Final status. To change report back to Final ADP user must delete the Post Audit report.	• View • Cannot Update • Cannot Delete
	No Appeal	• Change to Post Audit or Under Appeal • View/Update • Cannot delete	• View • Cannot Update • Cannot Delete
	Under Appeal	• Change to Post Audit or No Appeal • View/Update • Cannot delete	• View • Cannot Update • Cannot Delete

After the appropriate ADP resources have reviewed the County Submission, update the status of the plan by following the steps below.

Updating County Submission Status

What to Do	Results/Comments

1. Follow steps 1-7 on 'How to View a County Submission.'

2. Select the <u>Update Status</u> link. You will only be allowed to update the status of a plan with appropriate status. (See the County Submission Status Rules for details)

   If you attempt to update a plan with the incorrect status you will receive an error message.

3. Click **Update Status**. The Update Status page is displayed. (An example of the County Plan Status page is displayed below)

4. Select a status from the **Change Status to**: list. Only the designated statuses should be available. (See the County Submission Status Rules for details)

5. Click **Submit**. The submission list page will be displayed with the updated status.

Reporting

Each report can be viewed online or printed. Based on your County Profile, you will have access to various reports:

Reports:
- County Plan Original Submission Status Report
- Expenditure Status Report
- Other Services Waiting List Status Report
- Other Services Client Counts Status Report
- Entity Plan
- Service Plan
- Capacity projection
- Client Projection Plan
- Total Expenditures by County – Entity
- Total Expenditures by County – Service/Activity
- Total Client Capacity Planning
- Total Client Projection
- Financial Status Report
- Financial Status Report-Compare
- Compare Revision- Entity
- Compare Revision-Service/Activity
- Compare Revision-Capacity Planning
- Compare Revision-Client Projections

If no County Profile was established, the following reports can be viewed and printed:

Report Type:
```
Fiscal Plan Original Submission Status Report
Expenditure Status Report
Other Services Waiting List Status Report
Other Services Client Counts Status Report
Total Expenditures By County - Entity
Total Expenditures By County - Service/Activity
Total Client Capacity Planning
Total Client Projection
```

- **County Plan Original Submission Status Report:** Notes the "highest ranking" status associated with any County Plan created for a county for a given fiscal year. Only one status is reported per county, and will be displayed regardless of version number or date the plan was created. This report could be used to determine which counties have submitted plans with APPROVED status that are available for ADP's review. Refer to "Appendix A" on page 33 for a sample Plan Status report.

    The County Plans statuses are ranked from highest to lowest as follows:
    Highest rank: **ADP REVIEW/ISSUES PENDING**
    ADP APPROVED
    COUNTY APPROVED
    FINAL
    Lowest rank: **DRAFT**

N/A will be displayed on the Plan Status report if the county has not created a County Plan.

- **Expenditure Status Report -** Notes the "highest ranking" status associated with any Expenditure Report created for a county for a given fiscal period. Only one status is reported per county.
- **Financial Status Report Status Report - Notes** the "highest ranking" status associated with any Financial Status Report created for a county for a given fiscal period. Only one status is reported per county.
- **Total Expenditures by County – Entity** Lists allocation amount, county plan status, expenditure type, percentage breakdown of expenditure between Direct and Administrative, amount and percent of allocations per county per expenditure type and provides report totals. The data can be filtered by fiscal year, plan status, and county population range. See Appendix B for sample report.
- **Total Expenditures by County – Service/Activity** Lists allocation plus excess funds, county plan status, services, amount, percentage of allocation plus excess funds per county per service. The report also provides the breakdown of obligated and unobligated funds per county. The data can be filtered by fiscal year, plan status, and county population range. The user can choose to show service detail or not. See Appendix C for sample report.
- **Total Client Capacity Planning** Lists existing and plan additional client counts for by non-residential/outpatient and residential drug treatment, and other services for each county. The data can be filtered by fiscal year and county population range. See Appendix D for sample report.
- **Total Client Projection** Lists client projection categories referred from court/probation referred from parole and services from non-residential and residential drug treatment and other services for each county. The data can be filtered by fiscal year and county population range. See Appendix E for sample report.
- **Other Services Client Count Status Report -** Notes the "highest ranking" status associated with any Other Services Client Count Report created for a county for a given fiscal period. Only one status is reported per county. See Appendix F for sample report.
- **Other Services Waiting List Status Report -** Notes the "highest ranking" status associated with any Other Services Waiting List Report created for a county for a given fiscal period. Only one status is reported per county. See Appendix G for sample report.
- **Expenditure County Rollup – Entity –** Provides summary expenditure data by entity. Data is provided as a sum and an average across population ranges based on CADPAC groupings.
- **Expenditure County Rollup – Services –** Provides summary expenditure data by Service type. Data is provided as a sum and an average across population ranges based on CADPAC groupings.
- **Other Services County Rollup – Client Counts -** Provides summary client count data by demographic category. Data is provided as a sum and an average across population ranges based on CADPAC groupings.
- **Other Services County Rollup – Wait List -** Provides summary Wait List data by question. Data is provided as a sum and an average across population ranges based on CADPAC groupings.
- **Lead Agency/Contact Information –** Provides a list of Lead Agency and Contact Information by county.
- **Mailing Labels –** Provides a list of county contact information formatted for mailing labels. You have the ability to select one or more counties by highlighting the counties you are interested in printing.
- **FY Comparison of County Plan Financial Data -** Provides data from each county with a county plan in the status you select and all county plans with status higher than the status

selected.   The report is formatted to list each county data in summary, comparing one fiscal year to another.

- **ADP County Liaison** – Provides a list of the county liaisons assigned to each county. The report can be displayed by liaison name or by county name.
- **County Plan Data Elements -** Provides data from each county with a county plan in the status you select and all county plans with status higher than the status selected.   The report is formatted to list summary data for each county.

If a County Profile was established, the following reports for that county can be viewed and printed:

- **County Plan Original Submission Status Report**
- **Expenditure Status Report**
- **Other Services Client Count Status Report**
- **Other Services Waiting List Status Report**
- **Entity Plan:** Displays the County Plan entity information for a specific fiscal year and version.
- **Service/Activity Plan:** Displays the County Plan service/activity information for a specific fiscal year and version.
- **Capacity Plan:** Displays the capacity plan information for a specific fiscal year.
- **SATTA Plan Information**
- **SATTA Expenditure and Count Information**
- **SATTA Plan vs. Actuals Comparison**
- **Total Expenditures by County – Entity**
- **Total Expenditures by County – Service/Activity**
- **Total Client Capacity Planning**
- **Total Client Projection**
- **Financial Status Report -** Displays the Financial Status Report information for a specific fiscal year.
- **Financial Status Report – Compare -** Compares the Financial Status Report information in FINAL status to the report in POST AUDIT or higher for a specific fiscal year.
- **Compare Revision – Entity** – Compares the Entity information from the original County Plan information to the revision for that plan for a specific fiscal year. See Appendix I for sample report.
- **Compare Revision – Service/Activity** – Compares the Service/Activity information from the original County Plan information to the revision for that plan for a specific fiscal year.
  Compare Revision – Client Projections – Compares the Client Projections information from the original County Plan information to the revision for that plan for a specific fiscal year.
- **Compare Revision – Client Capacity** – Compares the Client Capacity information from the original County Plan information to the revision for that plan for a specific fiscal year.

Selecting a Report

What to Do	Results/Comments
1. Click the **Reporting** link on the Navigation bar.	The Report Request page is displayed.

What to Do	Results/Comments

2.	From the **Report Type** list, select the report desired.	If you did not specify a County Profile, the only reports available will be the Plan Status report, Total Expenditures by County – Entity, Total Expenditures by County – Service/Activity, Total Client Capacity Planning, and Total Client Projection.
3.	Click **Submit**.	The **Report Selection Criteria** page is displayed.

Plan Status, Capacity projection, Client Projection Reports

4.	Select a Fiscal Year or Fiscal Year Plan from the **Select a Fiscal Year** drop down list.	
5.	Click **Submit**.	The requested report is displayed.
		Refer to Appendix B in the SACPA Reporting Information User Manual for sample Entity, Service/Activity, Capacity projection and Client Projection reports.

What to Do	**Results/Comments**
	Refer to Appendix A in this Supplement for a sample Plan Status report.

Total Expenditure by County – Entity Report

Report Selection Criteria

To complete your report request, review the *Selection Criteria* and click the *Submit* button.

Report:	**Total Expenditures By County - Entity**
Selection Criteria:	
Fiscal Year	2001/2002
Fiscal Plan Status	
County Population Range	—

Submit   Reset

6.   Select a Fiscal Year or Fiscal Year Plan from the **Fiscal Year** drop down list.

7.   Choose a County Plan Status from the **County Plan Status** drop down list.

Your choices are Draft, Final, Approved, and Used for Allocation. The report will include plan data from the highest status with the highest version.

Also, if you choose a plan status you will receive all counties with that status along with all those in higher status. For example, if you choose Final you will receive all counties with statuses of Final, Approved and Used for Allocation.

8.   Enter **County Population Range**

This is an optional field. This option will filter the counties based on their population size. If left blank, all counties that meet the fiscal year and County Plan status criteria (regardless of population) will be displayed.

9.   Click **Submit**

The requested report is displayed.

Refer to Appendix B in this Supplement for a sample Total Expenditures by County -- Entity report.

What to Do	**Results/Comments**

**Total Expenditure by County –
Service Activity**

Report Selection Criteria

To complete your report request, review the *Selection Criteria* and click the *Submit* button.

Report:	Total Expenditures By County - Service/Activity

Selection Criteria:

Fiscal Year	2001/2002 ▾
Fiscal Plan Status	▾
Show Service Detail	○ Yes ◉ No
County Population Range	[ ] - [ ]

Submit   Reset

10. Select a Fiscal Year or Fiscal Year Plan from the **Fiscal Year** drop down list.

11. Choose a County Plan Status from the **County Plan Status** drop down list.

Your choices are Draft, Final, County Approved, ADP Approved, ADP Review/Issues Pending, revision County Approved, and Revision Accepted. The report will include plan data from the highest status with the highest version.

Also, if you choose a plan status you will receive all counties with that status along with all those in higher status. For example, if you choose Final you will receive all counties with statuses of Final, County Approved, ADP Approved and ADP Review/Issues Pending.

12. Select the appropriate radio button to **Show Service Detail**, choose either Yes or No

If you select Yes, treatment detail will be displayed. If you select No, summary level data will be displayed.

13. Enter **County Population Range**

This is an optional field. This option will filter the counties based on their population size. If left blank, all counties that meet the fiscal year and County Plan status criteria (regardless of population) will be displayed.

What to Do	**Results/Comments**
14. Click **Submit**	The requested report is displayed.
	Refer to Appendix C in this Supplement for a sample Total Expenditures by County – Service Activity report.

Total Client Capacity Planning and Total Client Projection Reports

Report Selection Criteria

To complete your report request, review the *Selection Criteria* and click the *Submit* button.

Report:	**Total Client Capacity Planning**

Selection Criteria:

Fiscal Year	2001/2002
Fiscal Plan Status	
County Population Range	-

Submit   Reset

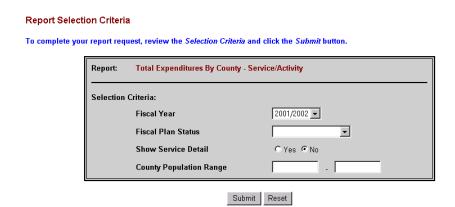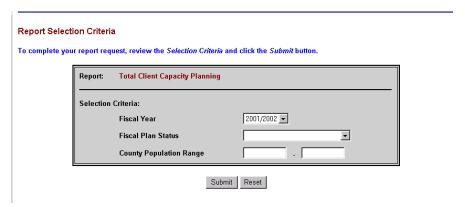| 15. Select a Fiscal Year or Fiscal Year Plan from the **Fiscal Year** drop down list. | |
16. Select a **County Plan Status** from the drop down box	
17. Enter **County Population Range**	This is an optional field. This option will filter the counties based on their population size. If left blank, all counties that meet the fiscal year and County Plan status criteria (regardless of population) will be displayed.
18. Click **Submit**	The requested report is displayed.
	Refer to Appendix D and E in this Supplement for a sample Total Client Capacity Planning and Total Client Projection Reports.

Appendix A

Sample Report: SACPA Plan Status Report

Report: SACPA_100   **California Department of Alcohol & Drug Programs**   Report Date: 05/03/2001
                                    SACPA Status Report   Time: 7:27:22PM

Fiscal Year: 2001/2002

County Code	Name	Status	Status Date	Review Date
01	Alameda	Draft	4/23/01	
02	Alpine	Draft	4/26/01	
03	Amador	N/A		
04	Butte	N/A		
05	Calaveras	N/A		
06	Colusa	N/A		
07	Contra Costa	N/A		
08	Del Norte	N/A		
09	El Dorado	N/A		
10	Fresno	N/A		
11	Glenn	N/A		
12	Humboldt	N/A		
13	Imperial	N/A		
14	Inyo	N/A		
15	Kern	N/A		
16	Kings	N/A		
17	Lake	N/A		

Report: SACPA_100   **California Department of Alcohol & Drug Programs**   Report Date: 05/03/2001
                                    SACPA Status Report   Time: 7:27:22PM

Fiscal Year: 2001/2002

County Code	Name	Status	Status Date	Review Date
18	Lassen	N/A		
19	Los Angeles	N/A		
20	Madera	Draft	4/30/01	
21	Marin	N/A		
22	Mariposa	Draft	4/27/01	
23	Mendocino	N/A		
24	Merced	N/A		
25	Modoc	N/A		
26	Mono	N/A		
27	Monterey	N/A		
28	Napa	N/A		
29	Nevada	N/A		
30	Orange	Approved	5/3/01	
31	Placer	N/A		
32	Plumas	N/A		
33	Riverside	N/A		
34	Sacramento	N/A		

Appendix B

Sample Report: Total Expenditures by County – Entity

Report: SACPA_600
California Department of Alcohol & Drug Programs
SACPA Entity Report - County Plan
Total Expenditures By County
For All Counties
Report Date: 02/27/2003
Time: 10:07:42

Fiscal Year: 2002/2003

County Plan Status	Expenditure Type	Direct	Admin	Amount	% Of Allocation	% Of Total Planned Expenditures
Amador						
ADP Review / Issues Pending (Version 2)						
Total Allocation				$312,693		
	Drug Treatment	92.2%	7.8%	$231,759	74.1%	74.1%
	Other Service	92.2%	7.8%	$27,126	8.7%	8.7%
	Criminal Justice	92.2%	7.8%	$53,708	17.2%	17.2%
	Obligated	92.2%	7.8%	$312,693	100.0%	
	Unobligated			$0	0.0%	
BATTA Allocation				$17,102		
	SATTA	9.7%	90.3%	$16,104,800	94,169.1%	100.0%
	Unobligated			($16,087,893)	-94,069.1%	

Page 1 of 5
https://sacpa.adp.state.ca.us

Report: SACPA_600
California Department of Alcohol & Drug Programs
SACPA Entity Report - County Plan
Total Expenditures By County
For All Counties
Report Date: 02/27/2003
Time: 10:07:42

Fiscal Year: 2002/2003

County Plan Status	Expenditure Type	Direct	Admin	Amount	% Of Allocation	% Of Total Planned Expenditures
Inyo						
ADP Review / Issues Pending (Version 2)						
Total Allocation				$427,911		
	Drug Treatment	100.0%	0.0%	$143,870	33.6%	68.1%
	Other Service	100.0%	0.0%	$22,246	5.2%	10.5%
	Criminal Justice	100.0%	0.0%	$45,000	10.5%	21.3%
	Obligated	100.0%	0.0%	$211,116	49.3%	
	Unobligated			$216,796	50.7%	
BATTA Allocation				$16,023		
	SATTA	100.0%	0.0%	$16,023	100.0%	100.0%
	Unobligated			$0	0.0%	

Page 2 of 5
https://sacpa.adp.state.ca.us

34

Appendix C

Sample Report: Total Expenditures by County – Service/Activity

Report: SACPA_700

California Department of Alcohol & Drug Programs
SACPA Service/Activity Report - County Plan
Total Expenditures By County
For All Counties

Report Date: 02/27/2003
Time: 10:15:18

Fiscal Year: 2002/2003

County Plan Status	Service/Activity	Amount	% of Allocation	% of Total Planned Expenditures
Amador				
ADP Review / Issues Pending (Version 2)				
Total Allocation		$312,698		
	Services	$240,698	77.0%	77.0%
	Drug Treatment	$216,698	69.0%	69.0%
	Non-Residential / Outpatient	$91,768	29.4%	29.4%
	Residential	$123,340	39.6%	39.6%
	Other Service	$26,000	8.0%	8.0%
	Case Management Activities	$71,322	23.0%	23.0%
	Obligated	$312,413	99.9%	
	Unobligated	$176	0.1%	
BATTA Allocation		$17,102		
	Obligated	$1,102,000	3136.3%	
	Unobligated	($1,084,393)	3176.3%	

Page 1 of 32

https://sacpa.adp.state.ca.us

Report: SACPA_700

California Department of Alcohol & Drug Programs
SACPA Service/Activity Report - County Plan
Total Expenditures By County
For All Counties

Report Date: 02/27/2003
Time: 10:15:18

Fiscal Year: 2002/2003

County Plan Status	Service/Activity	Amount	% of Allocation	% of Total Planned Expenditures
Butte				
ADP Approved (Version 1)				
Total Allocation		$1,336,820		
	Services	$909,623	68.0%	68.0%
	Drug Treatment	$909,623	68.0%	68.0%
	Non-Residential / Outpatient	$693,195	51.8%	51.8%
	Residential	$216,328	16.1%	16.1%
	Other Service	$0	0.0%	0.0%
	Case Management Activities	$427,397	32.0%	32.0%
	Obligated	$1,336,820	100.0%	
	Unobligated	$0	0.0%	
BATTA Allocation		$64,324		
	Obligated	$64,324	100.0%	
	Unobligated	$0	0.0%	

Page 2 of 32

https://sacpa.adp.state.ca.us

35

Appendix D

Sample Report: Total Client Capacity Planning

Report: SACPA_800			California Department of Alcohol & Drug Programs SACPA Client Capacity Planning Report For All Counties Existing and Planned Additional			Report Date: 07/24/2001 Time: 13:02:49		
Fiscal Year: 2001/2002								

Key: Existing Planned Additional Total County Of	Drug Treatment			Other Service		Total
	Non-Residential. Outpatient	Residential	Total		Total	
Alameda	0 0 0	0 0 0	0 0 0	0 0 0	0 0 0	0 0 0
Alpine	0 0 0	0 0 0	0 0 0	0 0 0	0 0 0	0 0 0
Kern	250 300 660	750 800 1,660	1,000 1,100 2,100	960 1,000 1,980	960 1,000 1,980	1,960 2,100 4,080
Madera	200 200 400	200 200 400	400 400 800	0 0 0	0 0 0	400 400 800
Orange	11 3 14	11 4 16	22 7 28	3 1 4	3 1 4	25 8 33
Total	451 503 884	961 1,004 1,886	1,422 1,507 2,828	963 1,001 1,984	963 1,001 1,984	2,385 2,508 4,383

Page 1 of 2

https://sacpa.adp.state.ca.us

Appendix E

Sample Report: Total Client Projection

Report: SACPA_500

California Department of Alcohol & Drug Programs
SACPA Client Projection Report
For All Counties

Report Date 07/24/2001
Time: 13:08:03

Fiscal Year: 2001/2002

County Of	Referrals					Services					
	Referred From Court/Probation	Total	Referred From Parole	Total	Total	Drug Treatment			Other Service	Total	Total
						Non-Residential/Outpatient	Residential	Total		Total	
Alameda	200	200	500	500	700	200	450	650	540	540	1,190
Alpine	300	300	500	500	800	250	500	750	580	580	1,330
Madera	20	20	100	100	120	20	10	30	10	10	40
San Benito	168	168	232	232	400	275	133	408	200	200	808
Total	688	688	1,332	1,332	2,020	745	1,093	1,838	1,330	1,330	3,168

Page 1 of 2

https://sacpa.adp.state.ca.us

Report: SACPA_900

California Department of Alcohol & Drug Programs
SACPA Client Projection Report
For All Counties

Report Date: 02/27/2003
Time: 10:18:48

Fiscal Year: 2002/2003

| County Of | BATTA | |
	No. of Projected Clients	No. of Projected Tests
Amador	350,000	400,000
Butte	410	3,232
Calaveras	55	2,141
Colusa	100	600
Contra Costa	500	2,700
Del Norte	30	400
El Dorado	185	1,480
Fresno	1,200	20,400
Glenn	59	2,607
Humboldt	100	750
Imperial	495	2,380
Inyo	22	171
Lassen	69	1,600
Madera	250	6,200

Page 4 of 8

https://sacpa.adp.state.ca.us

Appendix F

Sample Report: Expenditure Status Report

Report: SACPA_2000   California Department of Alcohol & Drug Programs   Report Date: 12/26/2001
SACPA Expenditure Status Report   Time: 15:18:37
Fiscal Period: July 1 - December 31, 2001

County Code	Name	Status	Status Date
01	Alameda	N/A	
02	Alpine	N/A	
03	Amador	N/A	
04	Butte	N/A	
05	Calaveras	N/A	
06	Colusa	N/A	
07	Contra Costa	N/A	
08	Del Norte	N/A	
09	El Dorado	N/A	
10	Fresno	N/A	
11	Glenn	N/A	
12	Humboldt	N/A	
13	Imperial	N/A	
14	Inyo	N/A	
15	Kern	County Submitted	12/18/01
16	Kings	N/A	
17	Lake	N/A	
18	Lassen	N/A	
19	Los Angeles	N/A	

Page 1 of 3   https://sacpa.adp.state.ca.us

Appendix G

Sample Report: Other Services Client Counts Status Reports

	California Department of Alcohol & Drug Programs		
Report: SACPA_Z200	SACPA Other Services Client Counts Status Report	Report Date:	12/26/2001
	Fiscal Period: July 1 - December 31, 2001	Time:	15:23:16

County Code	Name	Status	Status Date
01	Alameda	N/A	
02	Alpine	N/A	
03	Amador	N/A	
04	Butte	N/A	
05	Calaveras	N/A	
06	Colusa	N/A	
07	Contra Costa	N/A	
08	Del Norte	N/A	
09	El Dorado	N/A	
10	Fresno	N/A	
11	Glenn	N/A	
12	Humboldt	N/A	
13	Imperial	N/A	
14	Inyo	N/A	
15	Kern	County Submitted	12/14/01
16	Kings	N/A	
17	Lake	N/A	
18	Lassen	N/A	
19	Los Angeles	N/A	

Page 1 of 3   https://sacpa.adp.state.ca.us

Appendix H

Sample Report: Other Services Waiting List Status Reports

Report: SACPA_2100   California Department of Alcohol & Drug Programs   Report Date: 12/26/200·
SACPA Other Services Waiting List Status Report   Time: 15:25:48
Fiscal Period: July 1 - December 31, 2001

Count: Code	Name	Status	Status Date
01	Alameda	N/A	
02	Alpine	N/A	
03	Amador	N/A	
04	Butte	N/A	
05	Calaveras	N/A	
06	Colusa	N/A	
07	Contra Costa	N/A	
08	Del Norte	N/A	
09	El Dorado	N/A	
10	Fresno	N/A	
11	Glenn	N/A	
12	Humboldt	N/A	
13	Imperial	N/A	
14	Inyo	N/A	
15	Kern	ADP Received	12/14/01
16	Kings	N/A	
17	Lake	N/A	
18	Lassen	N/A	
19	Los Angeles	N/A	

     https://sacpa.adp.state.ca.us

Appendix I

Sample Comparison Report: Compare Revision – Entity Report

Report: SACPA_1200

California Department of Alcohol & Drug Programs
SACPA Fiscal Plan Revision Compare Report - Entity Plan
County Of: Kern
Fiscal Year: 2001/2002
Compare *Version 3* To *Revision 12/1/01*

Report Date: 12/26/2001
Time: 15:43:58

Entit; Type		Direct Services	Administrative Activities	Total	Percentage of ADP Allocation *$3,246,258
Drug Treatment					
substance abuse treatment	Version 3	56,889	270,154	327,043	10.07%
	Revision 12/1/01	1,000,000	200,000	1,200,000	36.97%
	Difference	943,111	-70,154	872,957	
Totals for Drug Treatment	Version 3	56,889	270,154	327,043	10.07%
	Revision 12/1/01	1,000,000	200,000	1,200,000	36.97%
	Difference	943,111	-70,154	872,957	
Criminal Justice					
probation supervision	Version 3	453,370	163,419	616,789	19.00%
	Revision 12/1/01	200,000	300,000	500,000	15.40%
	Difference	-253,370	136,581	-116,789	
Totals for Criminal Justice	Version 3	453,370	163,419	616,789	19.00%
	Revision 12/1/01	200,000	300,000	500,000	15.40%
	Difference	-253,370	136,581	-116,789	
Grand Total:	Version 3	510,259	433,573	943,832	29.07%
	Revision 12/1/01	1,200,000	500,000	1,700,000	52.37%
	Difference	689,741	66,427	756,168	

Page 1 of 1   * $2,301,685 (distribution) + $944,573 (excess funds) = $3,246,258 (ADP Allocation)   https://sacpa.adp.state.ca.us